

About ClientWise LLC



ClientWise is the premier business and executive coaching firm working exclusively with financial professionals.

We specialize in helping clients optimize growth and maximize revenue by engaging as a knowledgeable partner in accomplishing specific and significant business results. Our full-service coaching program empowers financial advisors, wholesalers, managers and executives to enhance performance through customized, action-oriented solutions based on each client's specific vision and situation.

Our certified coaches are members of the International Coaching Federation (ICF). They adhere to ICF's strict code of ethics and have the experience and insight to work with you on the unique challenges and opportunities you face each day.

Drawing from an in-depth knowledge of the financial industry, ClientWise's mission is to professionally develop industry leaders and consistently raise the bar for industry service, commitment and integrity. Simply put, our singular focus is to help you **get clear, get focused, and get results.**

Section 1

Strategy, Positioning & Market Focus



- 1 Define your ideal client clearly**
Write a precise description of the clients you serve best so your marketing attracts the target audience instead of everyone.
- 2 Build detailed client personas**
Go beyond age and assets by identifying values, goals, fears, and life stage so your messaging feels relevant.
- 3 Choose a marketable niche**
Specializing in a clear audience or problem helps prospects quickly understand why they should work with you.
- 4 Refine your unique value proposition**
State in plain language what makes your firm different and why that matters to the client. If you don't know, ask your clients what problem you solve for them.
- 5 Answer “Why choose you?” everywhere**
Assume every prospect is asking this question and make the answer obvious in your website, deck, and conversations.
- 6 Clarify your service model**
Explain what clients get, how often they hear from you, and what ongoing value your team provides.
- 7 Package specialized services**
Group your services into clear offerings for specific client needs such as retirement, business exits, or multi-generational planning.
- 8 Package your team**
Make sure your clients and prospects know there is depth supporting your work with them.
- 9 Update your capabilities deck**
Refresh your presentation so it reflects your current expertise, process, and client outcomes.
- 10 Create a strong positioning statement**
Develop a short, memorable statement that captures your firm's role, audience, and advantage.

Section 1

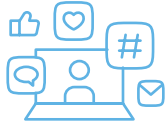
Strategy, Positioning & Market Focus



- 11 Align your team around the brand**
Create brand ambassadors and make sure everyone on your team can consistently explain who you serve and how you help.
- 12 Identify your top differentiators**
List the three to five things your firm does better or differently than competitors and ensure they are showcased in your value proposition and messaging.
- 13 Develop channel-specific plans**
Create separate goals and tactics for email, website, LinkedIn, events, and referrals so each channel has purpose.
- 14 Set an annual marketing budget**
Allocate spending intentionally instead of treating marketing as an afterthought. Benchmark spend is 1%–3% of gross revenue; for firms focused on growth it is 5%–12% of gross revenue.
- 15 Track marketing ROI by channel**
Measure which activities actually generate the best leads, meetings, and clients so you can reinvest wisely.
- 16 Build a marketing KPI dashboard**
Monitor traffic, conversions, email engagement, lead source, and pipeline movement in one place.
- 17 Define client journey stages**
Map the journey from awareness to discovery call to client so you can tailor messaging at each step.
- 18 Use your CRM as a growth system**
Track prospects, opportunities, next steps, and engagement history in a disciplined way.
- 19 Segment your CRM intelligently**
Group contacts by persona, niche, life stage, service need, and referral source for better targeting.
- 20 Audit your current marketing quarterly**
Regular reviews help you spot stale tactics, weak messaging, and missed opportunities.
- 21 Study your competitors objectively**
Review how competing firms position themselves online so you can sharpen your own message.

Section 2

Digital Visibility, Content, SEO & AI Search



22 Treat your website as your digital headquarters

Your website should educate, build trust, and make it easy for prospects to take the next step. Review your website metrics frequently to see where clients and prospects engage and drop off and adjust regularly.

23 Improve your homepage message

Lead with who you help, what pain points you solve for your clients, using their language, and why your approach matters.

24 Strengthen your About Us page

Your About Us page is the top visited page after your home page. Use it to build trust with a strong story, clear team bios, photos, and human language.

25 Build service pages that answer real questions

Each service page should explain outcomes, process, fit, and next steps clearly. Using FAQs in the language of a prospect drives engagement and search visibility.

26 Publish educational blog content regularly

Helpful articles build authority, create search visibility, and give prospects a reason to stay engaged.

27 Create evergreen content pillars

Build cornerstone content around retirement, succession, tax-aware planning, business owners, or your chosen niche.

28 Write content for search intent

Answer the exact questions prospects ask instead of writing vague thought pieces.

29 Optimize for Search Engine Optimization fundamentals

Use clear titles, helpful headings, internal links, strong page structure, and descriptive metadata so search engines can understand your pages.

30 Optimize for AI search and Answer Engine Optimization

Structure content so it can be surfaced in AI-driven search experiences by answering questions directly and clearly.

31 Build FAQ content that earns trust

FAQs help prospects self-educate and make your expertise easier to find in search.

Section 2

Digital Visibility, Content, SEO & AI Search



- 32 Use FAQ schema where appropriate**

When technically appropriate, structured FAQ markup can help search engines understand your content better, though visibility is never guaranteed.
- 33 Create downloadable lead magnets**

Offer guides, checklists, or toolkits that solve a specific problem in exchange for contact information.
- 34 Refresh content instead of only creating new content**

Updating strong legacy pieces can be faster and more effective than starting from scratch.
- 35 Publish client-centered case studies**

Show real-world outcomes and the thinking behind your approach without overpromising.
- 36 Create engagement**

Add assessments like Roth conversion and Social Security estimate calculators to attract prospects and generate leads.
- 37 Build a thoughtful LinkedIn presence**

LinkedIn should be a core channel for advisor visibility, credibility, and referral-partner awareness. Dedicate time to engaging regularly on LinkedIn to feed the algorithm and show regularly.
- 38 Post original insights on LinkedIn consistently**

Short posts, perspective pieces, and lessons from client work help build familiarity and trust. You can create LinkedIn campaigns to find prospects that mirror your Ideal Customer Profile.
- 39 Turn one idea into many content formats**

Repurpose a blog into a LinkedIn post, short video, email, webinar topic, and client resource.
- 40 Use short-form video strategically**

Brief educational videos can make your expertise more accessible and increase engagement.
- 41 Add video to key website pages**

Intro videos, planning explainers, and FAQ videos can make your site feel more personal and persuasive.

Section 2

Digital Visibility, Content, SEO & AI Search



- 42 Optimize video for discovery**
If you use video, make it technically accessible and clearly described so search engines can understand it better.
- 43 Launch a webinar series**
Webinars are great lead-generation tools. A recurring webinar gives you a repeatable platform to educate prospects and stay visible with clients.
- 44 Build an email newsletter worth opening**
Share practical, relevant insights instead of generic market commentary. A/B test subject lines to gain insights on engagement.
- 45 Create segmented email nurture tracks**
Define your prospect journey for each segment: prospects, clients, COIs, and event attendees. This will drive the content sequence.
- 46 Personalize communication with behavior data**
Use clicks, downloads, and past engagement to shape what content you send next.
- 47 Use marketing automation carefully**
Automation should make communication more timely and relevant, not robotic.
- 48 Retarget warm audiences**
Retargeting can keep your firm visible to people who already visited your website or engaged with your content.
- 49 Keep your brand visuals current**
Updated design, photography, and layout signal professionalism and relevance.
- 50 Invest in professional photography**
Strong photography improves your website, presentations, email signatures, and social profiles.
- 51 Create a strong introductory video**
A short, well-produced intro can quickly make your firm feel more human and approachable.
- 52 Review your online presence as a prospect would**
Search your own name and firm regularly to see what a new prospect actually finds.

Section 3

Client Experience, Retention & Expansion



- 53 Build a clear client communication calendar**
Set expectations for reviews, updates, educational touches, and life-event outreach.
- 54 Ask clients how they prefer to communicate**
Tailor format and frequency so communication feels thoughtful rather than generic.
- 55 Track key client milestones**
Birthdays, anniversaries, retirements, liquidity events, and family changes all create meaningful touchpoints. Your CRM is a powerful marketing tool.
- 56 Recognize client milestones personally**
A thoughtful note, call, or small gesture can reinforce loyalty more than another newsletter.
- 57 Use surveys to improve the experience**
Client feedback can reveal communication gaps, service opportunities, and perception issues.
- 58 Create a stronger onboarding process**
A polished, consistent onboarding experience helps new clients feel confident from day one and allows you to define your client experience to prospects.
- 59 Standardize your review meeting experience**
A consistent review framework helps clients understand progress and value.
- 60 Distribute meeting agendas in advance**
Clients feel more confident when meetings are focused and clearly organized.
- 61 Follow up with clarity**
Every meeting should end with documented next steps, ownership, and timing.
- 62 Cross-sell through relevance, not pressure**
Introduce additional services only when they clearly align with a client's goals or life stage.

Section 3

Client Experience, Retention & Expansion



- 63 Build multi-generational relationships intentionally**
Create educational opportunities for heirs and family members before a wealth transition happens.
- 64 Host client appreciation events**
Well-designed appreciation events deepen relationships and often generate introductions.
- 65 Create experiences, not just events**
Choose events that feel memorable and personal rather than formulaic or overly sales-oriented.
- 66 Run educational workshops for clients**
Workshops on retirement, tax planning, transitions, or family conversations help clients feel supported.
- 67 Offer niche-specific education**
Tailor workshops for business owners, executives, widows, next-gen family members, or other client groups.
- 68 Build a retirement-transition content series**
Clients facing retirement often need both financial and emotional guidance through the shift.
- 69 Address healthcare planning earlier**
Healthcare is one of the most persistent client anxieties, so make it part of your planning conversation.
- 70 Support lifestyle planning in retirement**
Clients often need help thinking through purpose, identity, and daily structure after leaving work.
- 71 Educate clients through the five stages of retirement**
This framework helps clients understand retirement as a progression rather than a one-time event.
- 72 Make your advice more visible**
Use summaries, visuals, and planning artifacts so clients can clearly see the value of your work.

Section 4

Referral Growth, Partnerships & Authority



- 73 Build a formal referral strategy**
Do not leave referrals to chance; identify who is most likely to introduce you and why.
- 74 Identify your loyal client advocates**
Know which clients actively trust you enough to recommend you to others.
- 75 Give advocates language they can use**
Simple, clear language makes it easier for clients to explain who you help.
- 76 Ask for introductions at the right moments**
The best time is often right after a strong outcome, milestone, or appreciative conversation.
- 77 Deepen relationships with centers of influence**
Build ongoing value-sharing relationships with CPAs, attorneys, and consultants. Expand your relationships to health and wellness experts to engage next generation clients.
- 78 Host joint education programs with COIs**
Webinars, roundtables, and lunch sessions can grow trust on both sides.
- 79 Create a professional advocate list**
Identify the referral partners who matter most and manage those relationships intentionally.
- 80 Follow up with referral partners consistently**
Strong referral relationships fade without regular contact and reciprocity.
- 81 Publish thought leadership regularly**
Consistent expert commentary builds authority with prospects, clients, and referral partners.
- 82 Develop a media-ready point of view**
Have clear perspectives on timely planning issues so you are easier to quote and invite.

Section 4

Referral Growth, Partnerships & Authority



- 83 Pitch yourself as a podcast guest**
Appearing on relevant podcasts can expand your reach and reinforce expertise.
- 84 Become a local media resource**
Offer practical commentary to local publications and programs when financial topics are in the news.
- 85 Write guest articles strategically**
Publish in places your ideal clients and referral partners actually pay attention to.
- 86 Build a speaking platform**
Speaking at events, associations, or niche conferences positions you as a guide rather than just a provider.
- 87 Improve your public speaking skills**
Better delivery improves seminars, webinars, prospect meetings, and media appearances.
- 88 Practice your pitch with real feedback**
Role-play with trusted people until your message sounds clear and natural.
- 89 Train your whole team to tell the same story**
Your firm sounds stronger when every team member can explain your value consistently.
- 90 Use testimonials and endorsements carefully**
If your firm uses them, ensure they are reviewed and handled in a way that aligns with the SEC marketing rule and required disclosures.
- 91 Use third-party ratings carefully**
Awards and ratings drive visibility for search engines. Ensure the required disclosures and compliance processes are in place.
- 92 Build authority through consistency**
One strong webinar or article is helpful, but repeated visibility is what creates market credibility.

Section 5

Community Presence, Local Visibility & Relationship Marketing

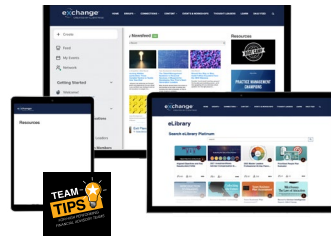


- 93 Stay active in your community**
Local visibility still matters when it is authentic and aligned with your brand.
- 94 Support local businesses intentionally**
Relationships with respected local owners can create trust and referral momentum.
- 95 Volunteer with purpose**
Choose causes that genuinely matter to you so your participation feels real, not promotional.
- 96 Sponsor community events selectively**
Sponsor activities that align with your audience and values rather than saying yes to everything.
- 97 Participate in signature local events**
Being visible at the events your community actually cares about strengthens recognition.
- 98 Build relationships with community connectors**
Well-networked local leaders can expand your reach if the relationship is genuine.
- 99 Host small local gatherings**
Coffee meetups, client circles, and intimate educational sessions can be more effective than large events.
- BONUS:**
- 100 Partner with complementary local organizations**
Libraries, nonprofits, business groups, and chambers can help you reach new audiences in a credible way.
- 101 Turn community involvement into brand proof**
When appropriate, share your local involvement on your website and LinkedIn so prospects can see what you stand for.

Above all else, for your marketing plan to be effective, you must truly believe in it, and have complete faith that your efforts will be fruitful and successful.



ACCESS CLIENTWISE RESOURCES
Podcast, Blog, Content, Team Tips
and Community eXchange™



About ClientWise

ClientWise is the premier business and executive coaching firm working exclusively with financial professionals. Through the growth of individuals at all production levels, our mission is to develop leaders who raise the industry standards of professionalism, service, commitment and integrity. Financial professionals become resourceful problem solvers, more adept practice managers, and better business owners through the ClientWise coaching process. In turn, they bring these sustainable skills to benefit their clients, their businesses, their institutions, and ultimately the industry overall.

As members of the International Coaching Federation (ICF), our coaches adhere to a strict code of ethics and are provided with unique experiences that allow them access to the challenges and opportunities faced by financial professionals on a daily basis. Each coaching program is distinctively tailored to match the professionals' objectives, through services ranging from individual and team coaching, workshop facilitation, team facilitation, and coaching skills training.

This coaching process is coupled with our original ClientWise practice management content, which is developed from in-depth research by industry experts in both coaching and financial services. These proprietary tools and databases, including The ClientWise Benchmark Assessment Report™ and The ClientWise Coach Insights Database™, contain best practices from leading professionals and access to the most significant financial trends and influences worldwide.

Our ability to provide sound industry knowledge through the powerful lens of a coaching partnership is unmatched, and this combination solidifies the ClientWise advantage.

Our Philosophy

The Coaching Partnership

The coaching relationship, unlike that of consulting or advising, is a partnership formed between the financial professional and the coach. The relationship between the two evolves as the professional's business evolves, and as the financial services industry in which it resides evolves. Throughout this partnership, financial professionals work through their initial goals so that they can later attain successively larger goals independently, having achieved the intellectual and emotional mechanisms to self-coach and self-guide through their coaching program.

While each coaching program is defined by a specific timeframe, the relationship between coach and professional, and the tools and to take advantage of the lasting relationship with their coaches by continuing to model the journey learning initiated by their partnership.

As our overarching mission is to generate consistent industry improvement through the growth of individual professionals, we continually tap into our resources to generate the best practice management tools and content with which to fuel that improvement. When the financial services industry shifts and changes the environment, we have clarity around how to evolve with it. Our proprietary content and coaching tune up programs allow financial professionals the ability to evolve alongside ClientWise throughout the life of their businesses, providing even more opportunities for success moving forward.

The Axis of Coaching & Content

Content alone, delivered en masse, will not help financial professionals achieve the level of success they desire. Nor will content alone increase the productivity of a given firm or the financial services industry on the whole. Proof of this lies in a marketplace laden with content that is accessible to all financial professionals, the majority of whom continually fall short of their goals. Instead, it is the unique axis at which great content meets a powerful coaching partnership that success is achieved. And it is from here that our founder, Ray Sclafani, launched ClientWise. Ray's understanding of advisor behavior, especially as related to the acquisition programs he created at Alliance Bernstein, motivated him to launch ClientWise in 2006, and develop the distinctive relationship between coaching and content that is now a ClientWise signature.

Our clients' success stories continue to prove that strong content supported by our scalable ClientWise coaching programs achieves far better and more sustainable business results than content alone.

Get Started

Learn more about The ClientWise Coaching Partnership and begin to create sustainable business results.

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ClientWise Coaching and Consulting Services

- ▶ Executive Coaching
- ▶ Research Services
- ▶ Curriculum Design and Program Development
- ▶ Presentation Delivery and Workshop Facilitation
- ▶ Professional Development and Coaching Services

ClientWise Financial Services Clients

- ▶ Industry Executives
- ▶ Wealth Advisors
- ▶ Financial Advisors
- ▶ Broker Dealer & Registered Investment Advisors
- ▶ Asset-Management and Insurance Companies

